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Japan

Poultry and Products Annual

2011 Japan Market Situation Update and 2012 Outlook

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Report Highlights:
Recovery of domestic broiler meat production from the previous year's decline is overshadowing Japan's 2012 import outlook. Total imports are expected to decline, impacting mostly high-priced imports from Brazil. American broiler meat appears to be gaining renewed recognition in the market due to increased capacity to supply specified sizes of "bone-less" cuts. Therefore, 2012 Japanese imports from the United States are projected to sustain their relatively high-level from the previous year.

Commodities:

Poultry, Meat, Broiler

Stocks:

Production, Supply and Demand Data Statistics:

Broiler PS&D Table

Poultry, Meat, Broiler Japan	2010		2011		2012	
	Market Year Begin: Jan 2010		Market Year Begin: Jan 2011		Market Year Begin: Jan 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Inventory (Reference)	107	107	107	105		106
Slaughter (Reference)	634	635	634	610		630
Beginning Stocks	116	116	111	109		119
Production	1,280	1,290	1,270	1,235		1,270
Whole, Imports	0	0	0	0		0
Parts, Imports	789	788	820	840		805
Intra-EU Imports	0	0	0	0		0
Other Imports	0	0	0	0		0
Total Imports	789	788	820	840		805
Total Supply	2,185	2,194	2,201	2,184		2,194
Whole, Exports	0	0	0	0		0
Parts, Exports	11	11	5	5		10
Intra EU Exports	0	0	0	0		0
Other Exports	0	0	0	0		0
Total Exports	11	11	5	5		10
Human Consumption	2,063	2,074	2,090	2,060		2,065
Other Use, Losses	0	0	0	0		0
Total Dom. Consumption	2,063	2,074	2,090	2,060		2,065
Total Use	2,074	2,085	2,095	2,065		2,075
Ending Stocks	111	109	106	119		119
Total Distribution	2,185	2,194	2,201	2,184		2,194
MIL HEAD, 1000 MT, PERCENT, PEOPLE, KG						

Author Defined:

2011 Broiler Annual

Preface

This report updates JA 0026 (voluntary report released Sept. 1, 2010).

Revisions were made to the previous production, supply, and demand (PS&D) forecast based on the latest government and industry statistics. Beginning last year, the Ministry of Agriculture, Forestry and Fisheries ceased its publication of broiler specific monthly production data; therefore Post has used supplemental data (number of chicks placed on feed and feed production for broilers, monthly poultry production data to estimate the domestic broiler production).

Slow economic growth has led consumers to opt for low-priced protein sources and this has helped sustain relatively high-levels of chicken consumption for the past several years. The massive outbreaks of Highly Pathogenic Avian Influenza (HPAI) in early 2011 and the huge earthquake that devastated the Tohoku and Kanto regions are the two primary events that have affected Japan's 2011 broiler market outlook (See 2011 Situation Summary and Updates).

Quantities listed in the text are made on the basis of Product Weight and no conversion rates are used (unless specified otherwise).

- Domestic Broiler Meat – dressed whole, bone-in
- Imported Broiler Meat – Customs Clearance Basis (boneless and bone-in combined with the majority of the broiler meat imports being boneless cuts)
- Imported Prepared Broiler Products – Customs Clearance Basis
- Stocks – Product Weight (mostly boneless) – Includes a small amount of spent hen stocks (no broiler specific stock data is available).

Note - Structure of Japanese Broiler Market:

Broilers comprise over 90 percent of the Japanese poultry meat market. In general, boneless leg meat is preferred to breast meat in this market. Nearly half of total imports are "prepared (or cooked) products of broiler meat", mainly supplied by Thailand and China. However, since 2004, imports of broiler meat from the above two countries have been on continuous suspension due to sporadic, but persisting HPAI outbreaks in the region. The food service sector utilizes large quantities of imported boneless meat cuts, mainly from Brazil. Japan was once a major market for U.S. bone-in leg cuts, however, this specific trade segment has shrunk over the past two decades due to increased competition. The U.S. poultry industry is very competitive in the international market and historically has focused on export markets that take bone-in cuts. The lack of the U.S. industry's capability to produce and export deboned cuts, coupled with prohibitive labor costs, has also been a major constraint for U.S. broiler meat in this market.

2012 Broiler Market Outlook (New)

- Domestic Output Recovery to Curve Imports

Japanese 2012 domestic broiler meat production is expected to resume normal levels, recovering from its unexpected drop in the previous year, and is projected up by three percent, reaching 1.27 million Metric Ton (MT). This projected recovery is partly due to the resumption of broiler hatchery and production operations in the Miyazaki prefecture in the Kyushu region (previously affected by HPAI) and Iwate prefecture in the Tohoku region, Japan's second and third largest broiler producing prefectures.

Increased availability of fresh domestic broiler meat in 2012 (priced lower than the previous year) and higher stocks will likely reduce total imports for the year. This should encourage Japanese households to look for domestic fresh branded chicken, especially in retail, at the expense of imports. In light of this preliminary assessment, Post projects Japan's 2012 total broiler imports to slip by four percent to 805,000 MT (Broiler Meat; down six percent to 425,000 MT, Prepared Products, down three percent to 380,000 MT). Assuming Japanese food service and processing demands for imported broiler meat and prepared products hold the same, Japan's 2012 total consumption is expected to be marginally higher from the previous year, estimated at 2.065 million MT. This would leave year-ending stocks relatively high compared to average years, which are estimated at 119,000 MT, unchanged from the previous year. Further consumption growth in 2012 should lower accumulated stocks.

- Ease of Quarantine Requirements (Related to Low Pathogenic Avian Influenza) to Help Smooth Importation of U.S. Broiler Meat

For the 2012 import outlook, Post projects imports from Brazil lower from the previous year, down five percent to 375,000 MT, negatively affected by its high export price offer and Japan's domestic broiler production recovery. Post has left imports from the United States unchanged from the previous year at 45,000 MT (assuming solid demand for price competitive U.S. cuts, high Brazilian export offer prices, and a strong JP Yen for the year). If the United States can boost exports of boneless cuts to Japan, imports could exceed this projection by gaining additional share from Brazil. The U.S. Poultry and Egg Export Council (USPEEC) has actively promoted U.S. poultry meat (broiler and turkey) by targeting retail markets. Increased U.S. supplies of boneless-cuts will further expand the scope of their Japanese promotion.
In September 2011, there was notable progress made in terms of Japan's animal quarantine requirements for poultry meat and egg products imported from the United States. The Animal and Plant Health Inspection Service (APHIS) and the Food Safety Inspection Service (FSIS) successfully negotiated the easing of Japan's export certification requirements related to Low Pathogenic Avian Influenza (LPAI). Starting September 12, the newly negotiated certificate statement allows U.S. suppliers to ship products through Avian Influenza-restricted states without an official sealing requirement. http://www.fsis.usda.gov/Regulations_&_Policies/Japan_requirements/index.asp

The market environment, coupled with a strong yen, appears to favor relatively low-priced U.S. broiler meat in this market. However, for further penetration and expansion, U.S. suppliers may need to increase their capability to produce and supply increased volume of boneless cuts to satisfy Japan's market needs.

In 2012, Japan will continue to remain the major market for Chinese and Thailand-prepared (cooked) broiler products in high performing sectors such as fast foods, convenience foods, and ready-to-eat meals. However, in the retail sector, the demand for cooked products may slow in 2012 as consumers resume purchases of fresh domestic chicken which were in short supply and highly-priced in the previous year. According to market research conducted by Agriculture and Livestock Industry Cooperation, high-feed prices, increased labor costs, and relatively strong demand, generated from both overseas and domestic markets, have reportedly been contributing to increased export offer prices from China and Thailand in 2011. If Chinese and Thai export prices continue to rise in 2012, it could overshadow the import outlook for this product category, and the number may come out weaker than projected.

2011 Broiler Market Situation Summary and Outlook (Revised)

At this time, the 2011 HPAI outbreaks and March earthquake have changed Japan's annual broiler demand and supply outlook that was made in the 2010 annual report (See note). Japan's broiler PS&D numbers were revised in this report based on the 2011 first half statistics recently publicized. In addition, the impacts of the above two events on the domestic production consumption and trade have been assessed and incorporated into Post's revision of PS&D numbers.

Note: Massive HPAI outbreaks which occurred in early 2011, severely affected the nation's second largest broiler producing state of Miyazaki, causing a large number of birds to be culled, and reducing broiler meat shipments from the prefecture. In addition, the broiler industry in Tohoku and Kanto regions were temporarily incapacitated by the March earthquake and Tsunami, also contributing to reduced shipments. This is especially true for the Iwate prefecture in the Tohoku region, the nation's third largest broiler producing state, which was badly affected by the earthquake and Tsunami. Some of the production and processing facilities in this prefecture, including parental stock operations and hatcheries owned by relatively large scale integrators, were reportedly demolished and washed away by the Tsunami. Miyazaki and Iwate combined for roughly 32 percent of the total broiler raised in the nation. By this summer, most infrastructures, including hatcheries and feed manufacturing, both required for the resumption of broiler production in the affected regions of Tohoku and Kanto have reportedly been restored. This will help the recovery of monthly domestic outputs during the second half of 2011 and will improve the sales environment for branded fresh chicken meat.

- Temporary Supply Deficit of Domestic Broiler Meat to Lead Unforeseen Import Growth in 2011

During the first half of 2011, domestic broiler meat production dipped (an estimated eight percent drop from the same period of the last year) due to the combined effects of the 2011 HPAI outbreaks, the March earthquake, and increasing feed costs since last year. The situation has made supply temporarily short and created unforeseen sales opportunities for imported broiler meat and prepared products, despite high international prices, to fill the demand and supply gap. Consumption of prepared foods has reportedly continued to be strong. As a result, first half imports are robust, showing double digit growth; Broiler meat, up 16 percent at 230,416 MT; and Prepared products, up 23 percent at 197,502 MT (See Table 5-a, 5-c).

Trade sources forecast tight second half imports due to the recovery for monthly outputs of domestic broiler meat, lower market prices of domestic broiler meat, and the recovery in consumption of fresh chicken meat in the retail sector. Many Japanese importers, confronted by the high price offers made by Brazilian suppliers, have reportedly held off in advancing their fourth quarter contracts (renewed on a quarterly basis). Weakened wholesale prices and accumulating stocks of imported cuts appear to be major concerns shared by Japanese importers, many of which are forced to operate below their breakeven levels (See Table 3-a, 3-4 and Table 4). Imports of prepared products are also expected to slow their pace during the second half of 2011 as consumers partially return to fresh domestic broiler meat for home cooking and away from takeout meals.

On an annual basis, Japan's 2011 total broiler imports, after factoring tight second half imports, are still projected to reach a 10-year record high, up by seven percent to 840,000 MT (Broiler Meat: up seven percent to 450,000 MT, Prepared Products, up six percent to 390,000 MT). The imports from Brazil are projected up only by five percent to 395,000 MT. Importers may significantly curtail products from Brazil to avoid losses due to price squeezes and are closely monitoring the accumulating stock situation. Strong demand seems to exist for American broiler meat and Post is projecting Japan's 2011 annual imports to exceed the 45,000 MT level, up over 30 percent from the previous year.

Meanwhile, the reported recovery taking place for Japanese hatchery operations is providing a better outlook for second half domestic broiler outputs, which is now expected to reverse the large decline suffered earlier in the year. Therefore, Japanese 2011 domestic broiler production is expected to fall by only four percent to 1.235 million MT. Based on the above, Post believes Japan's 2011 total broiler consumption could contract slightly, down by only one percent to 2.065 million MT, with the decline mainly due to unexpectedly lethargic household consumption of chicken meat which prevailed during the first half of 2011 (Table 1-a).

Summary of the First Half Results:

After the March earthquake, Japanese consumers temporarily refrained from eating out. However, the situation did not seem boost household consumption of chicken. Consumers avoided perishable food items, including fresh meat and chicken, and instead, chose ready-to-eat meals and convenience foods to take back home and eat.

Given substantially reduced domestic broiler meat production in the first half of 2011, average household consumption of chicken meat also dipped seven percent in quantity and two percent in expenditure. This situation created a temporary supply deficit, affecting distribution of fresh/chilled meat for the retail sector in particular. Factors contributing to the decline in first-half household consumption were; the virtual disappearance of domestic branded fresh chickens (fed specially-designed mixed-formula feeds with various promotional attributes), HPAI's negative image, high wholesale prices of domestic chicken (See table 2-a, 2-b), and a partial demand shift from domestic fresh meat to imports. All of the above factors created increased sales opportunities for imported broiler meat and prepared products for ready-to-eat meals sold at the retail sector during the first half.

Therefore, first half imports were stronger than anticipated. By country, Brazil, despite escalated export price offers (average CIF, up 39 percent at USD 3,370 per MT), achieved double digit growth, up 13 percent and accounting for 89 percent of Japan's total first half broiler meat import total (See table 3-b and 3-d). Following last year's trend, the United States continued to make inroads into this market, with imports up 28 percent at 21,018 MT for the period despite sharp export offer increases (average CIF, up 33 percent at USD 2,469 per MT). According to a trade source, although not yet large in volume, Japanese importers are now able to buy boneless leg meat with specified sizes from some U.S. suppliers. This has also contributed to first half import growth from the United States. In addition, the strong JP Yen appears to justify profitable export operations by U.S. producers who use a sophisticated Japanese-made deboning machine which virtually negates high labor cost disadvantages.

For prepared products, China, with its competitive offer (average CIF, up eight percent at USD 4,335 per MT), appears to have increased its share in first half imports (up 31 percent at 100,999 MT) compared to Thailand (up 12 percent at 94,542 MT) as Thai suppliers raised their offers (average CIF, up 14 percent at USD 4,971 per MT) for the period.

2010 Brief Market Summary (Supplemental Information)

- Unexpectedly Strong Consumption Re-boosted Imports in 2010

Due to surplus, 2008 frozen stocks, mainly created by excessive imports relative to demand, were carried over to 2009. This surplus forced Japanese importers to make steep cuts to imports in 2009. The following year, despite slow economic growth, an unforeseen demand hike occurred for broiler meat and products. This unprecedented rate of increase in total consumption for the year was estimated up five percent to a total of 2.074 million MT. In response, importers boosted their procurements from Brazil again in 2010. Therefore, 2010 imports became much higher than the projections made in the Post's previous annual report, with total imports surging 22 percent at 788,000 MT (Broiler Meat: up 27 percent at 420,000 MT, Prepared (Cooked) Products, up 17 percent at 368,000 MT). Also contributing to the 2010 import surge was a strong JP Yen against other major currencies, radical stock depletion that took place in 2009, and a relatively strong demand for chicken and prepared products that was generated by the food service and prepared meal (lunch boxes and take out foods/meals) sectors. One notable change in the 2010 market trend was the increased popularity and sales of domestic breast meat, occurring in the retail sector as the product began to appeal to low-price seeking households. Prior to this, breast meat was an unpopular retail item and had been mainly utilized for prepared foods and processing.

Table I-a: Monthly Average Quantities and Expenditures on Meat and Meat Products per Household YTD

	Beef				Pork				Chicken			
	Expenditure (JP Yen)		Quantity (gram)		Expenditure (JP Yen)		Quantity (gram)		Expenditure (JP Yen)		Quantity (gram)	
CY 2008	20,885		6,785		25,555		18,305		12,830		12,657	
CY 2009	20,166		7,045		24,790		18,639		12,614		13,649	
% Chg.	-3%		4%		-3%		2%		-2%		8%	
CY 2010	18,965		6,933		23,959		18,501		12,387		13,755	
% Chg.	-6%		-2%		-3%		-1%		-2%		1%	
CY 2011												
Jan.	1,550	-2%	552	-1%	2,072	3%	1,614	5%	1,042	-2%	1,128	-4%
Feb.	1,385	2%	515	-4%	1,980	2%	1,533	0%	932	-8%	1,028	-11%

Mar.	1,448	-5%	571	-2%	2,106	5%	1,650	5%	1,024	-2%	1,148	-2%
Apr.	1,529	5%	566	1%	2,025	5%	1,521	1%	970	-5%	986	-14%
May	1,572	0%	581	0%	2,004	1%	1,523	1%	1,030	2%	1,086	-4%
Jun.	1,478	10%	570	9%	1,963	5%	1,482	3%	993	5%	1,022	-6%
CY 2010 Jan/Jun	8,843		3,339		11,726		9,090		6,099		6,875	
CY 2011 Jan/Jun	8,962		3,355		12,150		9,323		5,991		6,398	
% Chg.	1%		0%		4%		3%		-2%		-7%	
Source: Ministry of Internal Affairs and Communication Bureau (Compiled by Post)												

Table I-b: Monthly Average Quantities and Expenditures on Meat and Meat Products per Household YTD

	Ground Meat				Ham				Sausage			
	Expenditure (JP Yen)		Quantity (gram)		Expenditure (JP Yen)		Quantity (gram)		Expenditure (JP Yen)		Quantity (gram)	
CY 2008	2,041		1,795		5,870		2,887		7,212		5,175	
CY 2009	2,045		1,888		5,670		2,947		7,197		5,324	
% Chg.	0%		5%		-3%		2%		0%		3%	
CY 2010	1,932		1,853		5,618		2,993		7,067		5,434	
% Chg.	-6%		-2%		-1%		2%		-2%		2%	
CY 2011												
Jan.	156	0%	144	-5%	319	1%	175	-1%	523	-3%	402	-5%
Feb.	160	0%	160	0%	299	1%	165	-1%	527	-2%	399	-3%
Mar.	170	1%	163	2%	345	2%	196	8%	599	0%	456	0%
Apr.	170	3%	155	-1%	352	4%	195	5%	608	2%	456	-3%
May	186	7%	174	7%	395	2%	219	4%	632	1%	494	6%
Jun.	173	-1%	167	-3%	454	-1%	264	4%	575	0%	431	-5%
CY 2010 Jan/Jun	998		963		2,138		1,173		3,476		2,687	
CY 2011 Jan/Jun	1,015		963		2,164		1,214		3,464		2,638	
% Chg.	2%		0%		1%		3%		0%		-2%	

	Bacon			
	Expenditure (JP Yen)		Quantity (gram)	
CY 2008	2,426		1,369	
CY 2009	2,391		1,379	
% Chg.	-1%		1%	
CY 2010	2,275		1,380	
% Chg.	-5%		0%	
	Bacon			
CY 2011				
Jan.	166	-3%	95	-7%
Feb.	486	163%	114	2%
Mar.	204	0%	132	9%
Apr.	204	7%	123	9%
May	217	9%	131	5%

Jun.	218	15%	133	13%
CY 2010 Jan/Jun	1,140		691	
CY 2011 Jan/Jun	1,495		728	
% Chg.	31%		5%	
Source: Ministry of Internal Affairs and Communication Bureau (Compiled by Post)				

Table 2-a): Monthly Average Wholesale Price of Domestic Broiler Bone-less Leg Meat YTD

						Unit: JP Yen per Kg.	
Bone-less Leg							
	2008	**2009**	**% chg.**	**2010**	**% chg.**	**2011**	**% chg.**
Jan.	746	659	-12%	674	2%	707	5%
Feb.	731	608	-17%	677	11%	705	4%
Mar.	745	571	-23%	677	19%	698	3%
Apr.	745	564	-24%	667	18%	700	5%
May	749	583	-22%	652	12%	696	7%
Jun.	740	587	-21%	629	7%	659	5%
Jul.	738	583	-21%	580	0%	625	8%
Aug.	721	582	-19%	541	-7%		
Sep.	705	592	-16%	544	-8%		
Oct.	694	610	-12%	575	-6%		
Nov.	672	625	-7%	622	-1%		
Dec.	657	651	-1%	662	2%		
1st Qtr Ave.	741	613	-17%	676	10%	703	4%
2nd Qtr Ave.	745	578	-22%	649	12%	685	5%
3rd Qtr Ave.	721	586	-19%	555	-5%		
4th Qtr Ave.	674	629	-7%	620	-1%		
Yearly Ave.	**720**	**601**	**-17%**	**625**	**4%**		
Source: ALIC Monthly Statistics							

Table 2-b): Monthly Average Wholesale Price of Domestic Breast Meat YTD

						Unit: JP Yen per Kg.	
Breast							
	2008	**2009**	**% chg.**	**2010**	**% chg.**	**2011**	**% chg.**
Jan.	312	333	7%	210	-37%	279	33%
Feb.	308	285	-7%	201	-29%	276	37%
Mar.	311	251	-19%	197	-22%	273	39%
Apr.	316	231	-27%	200	-13%	277	39%
May	329	225	-32%	206	-8%	279	35%
Jun.	342	214	-37%	227	6%	266	17%
Jul.	369	211	-43%	244	16%	272	11%
Aug.	368	211	-43%	250	19%		

Sep.	357	207	-42%	255	23%		
Oct.	358	205	-43%	252	23%		
Nov.	348	209	-40%	260	24%		
Dec.	339	211	-38%	275	30%		
1st Qtr Ave.	310	290	-7%	203	-30%	276	36%
2nd Qtr Ave.	329	223	-32%	211	-6%	274	30%
3rd Qtr Ave.	365	210	-43%	250	19%		
4th Qtr Ave.	348	208	-40%	262	26%		
Yearly Ave.	**338**	**233**	**-31%**	**231**	**-1%**		
Source: ALIC Monthly Statistics							

Table 3-a): Monthly Average Wholesale Price of Brazilian Boneless Leg Meat YTD

					Unit: JP Yen per Kg.		
Imported: Brazilian Bone-less Leg (Frozen)							
Month	**2008**	**2009**	**% Chg.**	**2010**	**% Chg.**	**2011**	**% Chg.**
Jan.	453	368	-19%	387	5%	421	9%
Feb.	453	365	-19%	395	8%	430	9%
Mar.	470	397	-16%	410	3%	432	5%
Apr.	518	440	-15%	410	-7%		
May	539	440	-18%	422	-4%		
Jun.	550	440	-20%	427	-3%		
Jul.	553	432	-22%	423	-2%		
Aug.	562	423	-25%	423	0%		
Sep.	570	416	-27%	423	2%		
Oct.	517	394	-24%	426	8%		
Nov.	475	381	-20%	432	13%		
Dec.	446	394	-12%	440	12%		
1st Qtr. Ave.	459	377	-18%	397	5%	427	8%
2nd Qtr. Ave.	536	440	-18%	420	-5%		
3rd Qtr. Ave.	562	424	-25%	423	-0%		
4th Qtr. Ave.	479	390	-19%	433	11%		
Yearly Average	**509**	**408**	**-20%**	**418**	**3%**		
Source: ALIC Monthly Statistics							

Table 3-b): Monthly Average Wholesale Price of American Bone-in Leg Meat YTD

					Unit: JP Yen per Kg.		
Imported: U.S. Bone-in Leg (Frozen)							
Month	**2008**	**2009**	**% Chg.**	**2009**	**% Chg.**	**2011**	**% Chg.**
Jan.	445	450	1%	410	-9%	460	12%
Feb.	445	450	1%	415	-8%	460	11%
Mar.	456	450	-1%	460	2%	460	0%
Apr.	480	450	-6%	460	2%		
May	491	450	-8%	460	2%		
Jun.	520	450	-13%	495	10%		
Jul.	520	450	-13%	575	28%		

Aug.	520	450	-13%	460	2%		
Sep.	520	450	-13%	460	2%		
Oct.	500	434	-13%	460	6%		
Nov.	500	430	-14%	460	7%		
Dec.	500	430	-14%	460	7%		
1st Qtr. Ave.	449	450	0%	428	-5%	460	7%
2nd Qtr. Ave.	497	450	-9%	472	5%		
3rd Qtr. Ave.	520	450	-13%	498	11%		
4th Qtr. Ave.	500	431	-14%	460	7%		
Yearly Average	**491**	**445**	-9%	**465**	4%		
Source: ALIC Monthly Statistics							

Table 4: Monthly Ending Stocks of Poultry Meat YTD

							Unit: Metric Ton	
	2008	**% chg.**	**2009**	**% chg.**	**2010**	**% chg.**	**2011**	**% chg.**
Jan.	121,274	-6%	173,438	43%	115,656	-33%	111,439	-4%
Feb.	115,910	-6%	164,380	42%	116,123	-29%	105,321	-9%
Mar.	112,518	-4%	154,195	37%	109,643	-29%	106,385	-3%
Apr.	112,455	-1%	149,728	33%	107,481	-28%	105,289	-2%
May	118,417	-1%	156,411	32%	106,746	-32%	115,480	8%
Jun.	114,552	-3%	153,166	34%	112,510	-27%	127,292	13%
Jul.	129,298	10%	154,890	20%	118,832	-23%		
Aug.	146,668	26%	150,176	2%	120,151	-20%		
Sep.	153,071	28%	139,041	-9%	119,873	-14%		
Oct.	170,457	40%	130,500	-23%	118,247	-9%		
Nov.	179,521	46%	121,830	-32%	115,054	-6%		
Dec.	**175,559**	**50%**	**115,574**	**-34%**	108,859	**-6%**		
Source: ALIC Monthly Statistics								
Note: Figures represents the poultry meat estimates. Over 70 % is imported poultry cuts.								
Majority is imported broiler cuts.								

Table 5-a): Japanese Imports of Broiler Meat YTD

Annual Series: 2006 - 2010, Year To Date: 06/2010 & 06/2011							
Quantity							
Partner Country	**Unit**	**Calendar Year**			**Year To Date**		
		2008	**2009**	**2010**	**06/2010**	**06/2011**	**%Change**
World	MT	426,092	331,091	420,253	199,484	230,416	16%
Brazil	MT	396,528	307,941	379,982	180,566	204,554	13%
United States	MT	23,866	18,316	34,183	16,359	21,018	28%
Philippines	MT	2,962	3,479	3,988	1,918	2,544	33%
Chile	MT	1,157	404	1,520	413	1,840	346%
Others	MT	1,579	951	580	228	460	102%
Source: Global Trade Atlas							

Table 5-b): CIF Price Data

Annual Series: 2006 - 2010, Year To Date: 06/2010 & 06/2011							
Unit Value(United States Dollars)							
Partner Country	Unit	Calendar Year			Year To Date		
		2008	2009	2010	06/2010	06/2011	%Change
World	MT	3,067	2,493	2,606	2,405	3,292	37%
Philippines	MT	4,325	4,453	4,244	4,482	3,761	-16%
Chile	MT	3,406	3,320	2,773	2,349	3,280	40%
Brazil	MT	3,119	2,509	2,647	2,431	3,370	39%
United States	MT	2,000	1,781	1,934	1,855	2,469	33%
Source: Global Trade Atlas							

Table 5-c): Japanese Imports of Prepared (Cooked) Broiler Products YTD

Annual Series: 2006 - 2010, Year To Date: 06/2010 & 06/2011							
Quantity							
Partner Country	Unit	Calendar Year			Year To Date		
		2008	2009	2010	06/2010	06/2011	%Change
World	MT	310,457	313,822	368,364	162,970	197,502	21%
Thailand	MT	179,639	175,466	190,100	84,668	94,542	12%
China	MT	128,115	135,663	175,506	77,300	100,999	31%
Others	MT	2,703	2,693	2,758	1,002	1,961	96%
Source: Global Trade Atlas							

Table 5-d): CIF Price Data

Annual Series: 2006 - 2010, Year To Date: 06/2010 & 06/2011							
Unit Value(United States Dollars)							
Partner Country	Unit	Calendar Year			Year To Date		
		2008	2009	2010	06/2010	06/2011	%Change
World	MT	4,264	4,397	4,306	4,208	4,639	10%
Thailand	MT	4,386	4,599	4,522	4,374	4,971	14%
China	MT	4,097	4,146	4,070	4,024	4,335	8%
Source: Global Trade Atlas							